Charter School Facilities Program

2017 FILING PERIOD TECHNICAL WORKSHOPS

Presented by
Office of Public School Construction
(OPSC)

Charter School Facilities Program (CSFP)

- Established in 2002
- Provides funding for classroom facilities
 - 50% State grant
 - 50% charter school match
 - Loan option for match
 - California School Finance Authority (CSFA)
 - New construction
 - Rehabilitation of district owned sites that are at least 15-years old, for charter use
- Applications accepted during specified filing rounds

When Can I Apply?

- February 6 June 5, 2017
- Date application received does not determine funding, but can be used as a tie breaker
- Applications with an original signature and all supporting documents must be physically received by OPSC by 5:00 p.m. on June 5, 2017.

Office of Public School Construction Subject: 2017 CSFP Filing Round 707 Third Street, 6th Floor West Sacramento, CA 95605

Who Can Apply?

Eligible charters

- Independent and dependent
- Two years operating experience or administrative experience
- Provide classroom based instruction
 - Meeting the requirements of Education Code 47612.5(e)(1).
- Charter petition approved prior to application submittal date
- Applicants
 - Charter school
 - Local school district
 - Applicant receives funding
 - If requesting loan, must be same applicant that received funding

What Am I Applying For?

Preliminary Apportionment (PA)

- Reservation of bond authority
 - \$500 million available
- Proposed project costs
 - Based on grant calculations
 - 50% State grant
 - 50% Charter match
 - Loan for Charter 50% match, if requested
 - Must be found financially sound by CSFA
- Submit request to convert PA to final apportionment within four years
 - Possible one-time, one-year extension

What Types of Projects?

- New construction
 - Adds capacity
 - Construction of a new school
 - Addition of classrooms to an existing school
 - Funded based on pupil capacity of project
 - Title held by:
 - School district
 - Governmental entity
 - Charter school
 - Charter school must submit request to hold title

What Types of Projects?

- Rehabilitation
 - Existing district facilities that are at least 15-years old
 - Age begins 12 months from Division of the State Architect (DSA) approval
 - Work is similar to modernization but can include structural changes
 - Increased square footage/classrooms = new construction
 - Funded on a square footage basis
 - Funding may be capped by new construction base grant
- Combination project

How is the PA Determined?

- Base grant
 - New Construction: pupil grant
 - Rehabilitation: square footage
- Supplemental and excessive cost grants
 - New construction School Facility Program (SFP) Regulation 1859.163.1
 - Rehabilitation SFP Regulation 1859.163.5
 - Examples
 - Site acquisition
 - Site development
 - Multilevel construction
- Inflator factor

Calculating the Base Grant

- New Construction
 - Multiply the project capacity by the appropriate 2017 pupil grant amounts:

• K-6	\$11,161	25 pupils per CR
• 7-8	\$11,816	27 pupils per CR
• 9-12	\$14,997	27 pupils per CR
Non-severe	\$20,966	13 pupils per CR
Severe	\$31,351	9 pupils per CR

- Rehabilitation
 - Multiply square footage by the 2017 grant amount
 - Non-toilet \$182Toilet \$326
- Pupil grants and square footage requested at the PA phase may not be increased at the time of conversion

What Happens if Program is Oversubscribed?

- Preference points are assigned to each application (SFP Regulation Section 1859.164.1)
 - 160 maximum points possible

Percentage of District Overcrowding
 Up to 40 points

Low Income
 Up to 40 points

Non-Profit Status
 40 points

Existing Facilities
 40 points

- The Funding Matrix is used to determine funding order (SFP Regulation Section 1859.164.)
 - See Preference Points and Funding Matrix Guidelines

Getting Started

- Approved charter petition
 - Must be approved prior to date application is received by OPSC
- Determine facility needs
 - Work with district to consider existing facilities
 - Applicant will certify to this on Form SAB 50-09
- District or charter school board resolution supporting application
 - Depends on applicant

Getting Started

- Notify school district (if charter applicant)
 - SFP Regulation Sections 1859.162 and 1859.162.1
 - 30 days prior to submitting application to OPSC
 - May 5, 2017 last day to notify district and make June 5, 2017 deadline to submit application
 - Must submit evidence of date notification was received
 - New construction
 - Include in notification request to update district new construction eligibility and provide certification to number of unhoused district pupils project will house
 - See Sample District Notification

Getting Started

- Rehabilitation agreement
 - SFP Regulation Section 1859.163.4
- California Department of Education (CDE) recommended site size letter

Lisa Constancio LConstancio@cde.ca.gov (916) 445-4889

Identify proposed location for project

What Makes a Complete Application?

- Funding Application
 - Application for Charter School Preliminary Apportionment (Form SAB 50-09)
- Financial Soundness
 Application
 - California School Finance
 Authority Charter School
 Facilities Program Application
 (Form CSFA 03-01)
 - Submit to CSFA
- Supporting Documentation



Animo Venice Charter High School – Venice, CA

Items Required for All Application Types See Charter School Facilities Program – Preliminary Apportionment Application Submittal Requirements

- Narrative description of the proposed project.
- Approved Charter Petition
- CDE Estimated Recommended Site Size letter
- Verification of non-profit status (if applicable)
- Verification of notification to the school district (charter schools applying independently)

Items Required for All Application Types (cont.)

Narrative description

- SFP Regulation Section 1859.162(c) Requires:
 - Number of classrooms and grade level of pupils
 - Permanent or portable
 - Proposed opening date
 - Charter School General Location
- Helpful to include
 - CDS Code
 - Loan?
 - District site name for rehabilitation projects

Additional Items for New Construction Applications

- District certification to the number of unhoused students the project will serve, in the form of a board resolution (charter schools applying independently)
 - If district is applicant, provide this information on the Form SAB 50-09
- Methodology for determining the number of unhoused students the project will serve

Additional Items for New Construction Applications

- Relocation and Department of Toxic Substances
 Control (DTSC) cost documents, if applicable
 - Site must be acquired though court condemnation to qualify for relocation
- Cost estimate for site development reflecting 100% of the proposed work, and approved site development and off-site plans
 - Only if requesting more than the allowed \$70,000 per proposed useable acre

Additional Items for New Construction Applications (If requesting funding for Site Acquisition)

- Appraisal or Preliminary Appraisal that is less than six months old; or
 - Must meet requirements in SFP Regulation Section 1859.74.1
- Median cost valuation
 - Excel worksheet
 - Price per acre format
 - Must meet requirements in SFP Regulation Section 1859.163.2(a)(2)
- Escrow closing statement

Additional Items for Rehabilitation Applications

- Drawings showing dimensions (including the total enclosed exterior square footage) of classrooms and subsidiary facilities to be rehabilitated
 - Drawings must also highlight Toilet area
- Agreement between the District and Charter School that authorizes the use of the District's facilities for the CSFP (charter schools applying independently)

Completing the Funding Application

- Filling out the Form SAB 50-09
- How to Find the Locale Code
- How to Find the Free and Reduced Lunch Percentages



Oscar de la Hoya Animo Charter High School – Los Angeles, CA

APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT SCHOOL FACILITY PROGRAM AB 50-09 (REV 10/14)	OFFICE OF PUBLIC SCHOOL CONSTRUCTION Page 4 of 6
The school district or Charter School named below applies to the State Allocation Board via the Office of Public School Apportionment under the provisions of Chapter 12.5, Part 10, Division 1, Article 12, commencing with Section 17078.50, e	,
thereto.	DOCUMENTARY APPLICATION NUMBER
school district applying on Behalf of Charter School Charter School applying on its Behalf	PRELIMINARY APPLICATION NUMBER
	PRELIMINARY APPLICATION NUMBER PROJECT TRACKING NUMBER
SCHOOL DISTRICT APPLYING ON BEHALF OF CHARTER SCHOOL CHARTER SCHOOL APPLYING ON ITS BEHALF	
SCHOOL DISTRICT APPLYING ON BEHALF OF CHARTER SCHOOL CHARTER SCHOOL APPLYING ON ITS BEHALF PROPOSED PROJECT NAME	PROJECT TRACKING NUMBER

 Type of Application—Check Only One New Construction Preliminary Charter School Apportionment Site Acquisition Costs [Section 1859.164.2(b)] Rehabilitation Preliminary Charter School Apportionment 	
 2. Type of Project a. Elementary School Middle School High School b. Name of school district where the charter school project will be physically located: 	
3. Number of Classrooms/Useable Acres Number of Classrooms: Existing Acres (Useable): Proposed Acres (Useable):	

4.	Ad	ditional Project Information—New	Construction Only
	a.	Project Capacity	K-6
			7–8
			9–12
			Non-Severe
			Severe
	b.	School District's Unhoused Pupils to b	e housed in the Charter School
			K-6
			7–8
			9–12
			Non-Severe
			Severe
	c.	Addition to existing site?	Yes No
		If yes, enter school name:	
 Increase in Preliminary Apportionment—New Construction Only a. Multilevel Construction b. Site Acquisition: 			dian cost: \$

		pecific or historical cost:	\$	_
	(3) Hazardous materia	al clean-up:	\$	-
	 c. Site Development 			
	\$70,000 per propos	sed useable acre		
	50 percent of speci	fic or historical cost:	\$	_
	General Site			
	d. Geographic Percen	t Factor:		%
	e. Small Size Project			
	f. Urban Allowance			
6.	Additional Project Infor	mation—Rehabilitation On	lv	
٠.	Square Footage of Project:		,	
	Square rootage of Project:			
		Non-Toilets Facilities (sq. ft.):		-
		Toilet Facilities (sq. ft.):		_

7.	Increase in Preliminary Apportionment—Rehabilitation Only		
	a. Geographic Percent Factor:	%	
	b. Small Size Project		
	c. Urban/Security/Impacted Site		
	d. Number of 2-Stop Elevators:	_	
	e. Number of Additional Stops:		
8.	Project Progress Dates		
	a. Construction Contract(s) awarded on:		
	(If the space provided is not sufficient for all applicable contract dates, please		
	list all dates on a separate attachment to this form.)		
	b. Notice to Proceed issued on:		
	c. If the Construction Contract was awarded prior to January 1, 2012, have you		
	initiated and enforced an LCP approved by the DIR pursuant to Labor Code		
	Section 1771.7 for this project?		

9. Prevailing Wage Monitoring and Enforcement Costs:

lf t	If the Construction Contract(s) was awarded on January 1, 2012 through June 19,			
20	2014, please indicate which method was or is being used to meet the prevailing			
Wa	age monitoring requirements, pursuant to LC Section 1771.3 in effect on January			
1, 2	1, 2012 through June 19, 2014:			
	DIR Public Works administration and enforcement			
	DIR Approved District LCP			
	Collective bargaining agreement, pursuant to Labor Code Section 1771.3(b)(3)			
	in effect on January 1, 2012 through June 19, 2014			

Prevailing Wage Monitoring and Enforcement

- Special requirements if initial contract award date between 1/01/2012 and 6/19/2014
- Contract award date on or after 6/20/2014
 - Districts/charters required to notify the Department of Industrial Relations within five days of initial contract award pursuant to LC section 1773.3(a)(1)
 - Senate Bill 854, Chapter 28, Statutes of 2014

Additional information is available at: http://www.dgs.ca.gov/opsc/Programs/pwmlcp.aspx

10. Priority Order

11. Charter School Information

- a. Current Charter School enrollment:
- b. Is Charter School not for profit?
- c. Enter locale code of charter school:
- d. Free/Reduced Lunch:
- e. Additional Application Number:

Yes	No

#

How to Find the Locale Code

1. Go to http://nces.ed.gov/ccd/schoolsearch/

Search for Public Schools	CCD Common Core of Data	
School Information	District Search	Data Notes/Grant IDs Help
School Name: NCES School Street Address: City: (Browse)	istance: Miles from Zip	SEARCH TIP: If you are having difficulty finding your school, try only entering the city, state, and/or a key word in the name.
School Description Regular ✓ Special Education ✓ Vocational ✓ Other/ Specific School Type All ⊙ Charter School ○ Magnet School ○ Grade-Span All PK KG 1 2 3 4 5 6 7 8 Includes Grade ⊙ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ Low Grade ⊙ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ High Grade ⊙ ○ ○ ○ ○ ○ ○ ○ ○ ○	0000	SEARCH TIP: Use the additional characteristics fields in conjunction with any of the School Information. Additional Characteristics should not be used if you have already entered the name of a school.

Source: CCD Public school data 2014-2015, 2015-2016 school years

How to Find the Locale Code

2. Select the school

S	arch for Public Schools		C	CD Commo	n Data
Sea	arch Results (records: 66)	Modify	Search Data N	otes/Grant IDs	<u>Help</u>
	School Name	Phone	County*	Students* Gr	ades*
1.	CARVER (GEORGE WASHINGTON) ELEMENTARY 1360 Oakdale AVE., San Francisco, CA 94124	(415) 330-1540	San Francisco County	280	KG-5
2.	FORT WASHINGTON ELEMENTARY 960 East Teague AVE., Fresno, CA 93720	(559) 327-6600	Fresno County	574	KG-6
3.	GEORGE WASHINGTON BATTLES ELEMENTARY 605 East Battles RD., Santa Maria, CA 93454	(805) 361-6880	Santa Barbara County	851	KG-6
4.	GEORGE WASHINGTON CARVER ELEMENTARY 1401 West Santa Ana BLVD., Santa Ana, CA 92703	(714) 564-2000	Orange County	564	KG-3
5.	GEORGE WASHINGTON CARVER MIDDLE 4410 Mckinley AVE., Los Angeles, CA 90011	(323) 846-2900	Los Angeles County	1,590	5-8
6.	GEORGE WASHINGTON CARVER SCHOOL OF ARTS AND SCIENC 10101 Systems PKWY., Sacramento, CA 95827	(916) 228-5751	Sacramento County	245	9-12
7.	GEORGE WASHINGTON CHARTER 45-768 Portola AVE., Palm Desert, CA 92260	(760) 862-4350	Riverside County	766	KG-5
8.	GEORGE WASHINGTON ELEMENTARY 251 Whittier ST., Daly City, CA 94014	(650) 991-1236	San Mateo County	366	KG-5
9.	GEORGE WASHINGTON ELEMENTARY 831 West Lockeford ST., Lodi, CA 95240	(209) 331-7451	San Joaquin County	437	KG-6
10.	GEORGE WASHINGTON ELEMENTARY Po Box 1067, Hanford, CA 93232	(559) 585-3805	Kings County	562	KG-6
11.	GEORGE WASHINGTON ELEMENTARY 1220 West Parkridge AVE., Norco, CA 92860	(951) 736-3326	Riverside County	983	KG-7
12.	GEORGE WASHINGTON ELEMENTARY 2322 North Lincoln ST., Burbank, CA 91504	(818) 558-5550	Los Angeles County	490	KG-5

How to Find the Locale Code

Search for Public Schools

CCD Common Core of Data

w v		
School Directory Information (2015-2016 school year)	Search Results Modify Search	Data Notes/Grant IDs Help
School Name: Fort Washington Elementary	NCES School ID: 060903000909	State School ID: 1062117- 6005862
District Name: Clovis Unified district information	NCES District ID: 0609030	State District ID: 1062117
Mailing Address: 960 E. Teague AVE. Fresno, CA 93720-1704	Physical Address: 960 E. Teague AVE. Fresno, CA 93720-1704	Phone: (559) 327-6600
Туре:	Status:	Charter:

Currently operational

School Details (2014-2015 school year)

County: Fresno County schools in county

Grade Span: (grades KG - 6)

KG 1 2 3 4 5 6

Locale: City: Large (11)

Magnet: No

Regular school

Total Students: 613

No

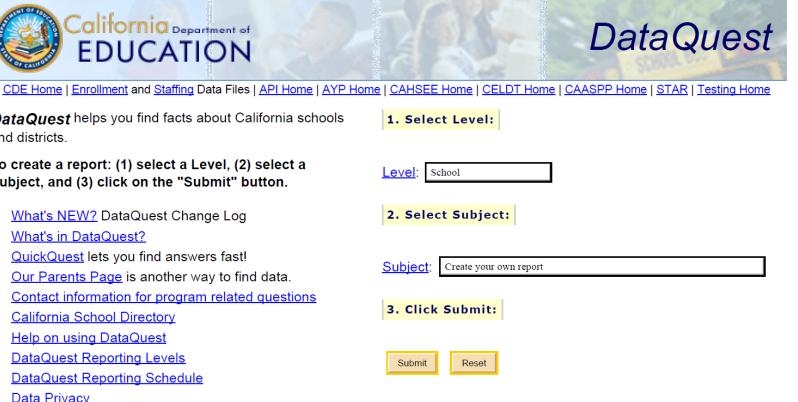
Classroom Teachers (FTE): 21.00 Student/Teacher Ratio: 29.19

Title I School: No

Title I School-Wide Program: †

How to find the Free and Reduced Lunch Percentages

1. Go to http://dq.cde.ca.gov/dataquest/



Change Text Size: A A A



DataQuest helps you find facts about California schools

To create a report: (1) select a Level, (2) select a Subject, and (3) click on the "Submit" button.

- What's NEW? DataQuest Change Log
- What's in DataQuest?

and districts.

- QuickQuest lets you find answers fast!
- Our Parents Page is another way to find data.
- Contact information for program related questions
- California School Directory
- Help on using DataQuest
- DataQuest Reporting Levels
- DataQuest Reporting Schedule
- **Data Privacy**

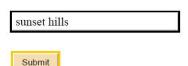
How to find the Free and Reduced Lunch Percentages

2. Enter the school name or district information



0	Single year select year:	2015-16	

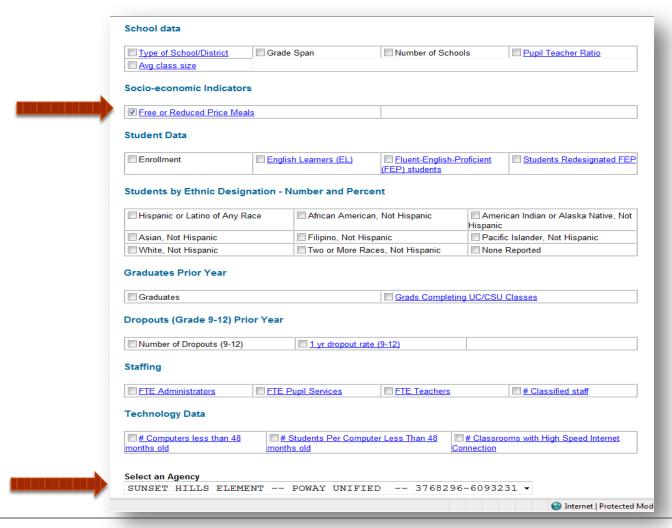
2) Type a portion of the name then press the "Submit" button.



1) Determine a time frame.

How to find the Free and Reduced Lunch Percentages

3. Select the "Free or Reduced Price Meals" box.



How to find the Free and Reduced Lunch Percentages

Selected School Level Data Sunset Hills Element--Poway Unified --3768296-6093231 for the year 2015-16

- Click on the school name to run other reports for the same school.
- Click on "District Total", "County Total" or "State Total" to view reports at that level.

School	CDSCode	Free & Reduced Price Meals	Enrollment Used for Meals
Sunset Hills Elementary	37682966093231	74 (15.9%)	464
<u>District Total:</u>		5,789 (16.2%)	35,771
County Total:		259,517 (51.4%)	504,603
State Total:		3,665,445 (58.9%)	6,227,268



Completing the Form SAB 50-09

Y APPORTIONMENT

STATE ALLOCATION BOARD OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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17	Cal	rtit	1cai	tion

I certify that the information reported on this form is true and correct and that:

- I am an authorized representative of the charter school designated by the governing board or equivalent authority of the charter school and have notified both the Superintendent and the governing board of the school district in writing, at least 30 days prior to the date of this application, of our intent to submit a preliminary application (complete Part A below); or,
- I am an authorized school district representative submitting this application on behalf of a charter school pursuant to Education Code Section 17078.53 (c)(1) (complete Part B below). If this box is checked the following certifications shall apply to the school district.
- A resolution or other appropriate documentation supporting this application under Article 12, Chapter 12.5, Part 10, Division 1, Title 2, commencing with Section 17078.50, et. seq., of the Education Code was adopted by the School District's Governing Board or the governing board or other equivalent authority of the charter school on, ______; and,
- · Prior to submitting this application the charter school and school district have con-

Completing the Form SAB 50-09

NAME OF REPRESENTATIVE		TITLE	TITLE	
ADDRESS				
TELEPHONE	FAX NUMBER	E-MAIL		
SIGNATURE OF AUTHORIZED CHARTER SCHOOL REPRESENTATIVE		DATE		
art B. School District Filing on Beha	alf of Charter School			
SIGNATURE OF AUTHORIZED DISTRICT REPRESENTATIVE		DATE		

PA Application Process

- Submit PA application packet to OPSC and financial soundness packet to California School Finance Authority (CSFA) http://www.treasurer.ca.gov/csfa/charter.asp
- OPSC reviews submittal for completeness
 - 24 hour letters
- OPSC reviews all documents
 - 15 and 4 day letters

PA Application Process (cont.)

- PA amount determined and given to CSFA
- Preference points assigned
- Projects ranked using funding matrix
- Financial soundness determination by CSFA
- PAs awarded at State Allocation Board (SAB) meeting

Determine if Charter Will Hold Title

- Submit request to hold title per EC 17078.63(a)(3) and SFP Regulation Section 1859.172
- Request must be approved by SAB
- New construction projects only
- Must be determined prior to:
 - Executing Charter School Agreements
 - Release of site acquisition or new construction funding

Determine if Charter Will Hold Title (cont.)

- Special requirements per EC 17078.63(a)(3)
 - Title held in trust for the benefit of the state public school system
 - Recorded in title if charter holds title:
 - Lien for total amount of funds provided by the state
 - Restrictive covenant specifying facility used for public school purposes
 - Remainder interest to successor charter school, then school district, then board if when facility no longer used by applicant charter school

Access Advance Funding

- Priority Funding Process
 - Unfunded Approval on Unfunded List (Lack of AB 55 Loans)
- Participate in bi-annual certification round
 - 30 day period in May/June and November/December
 - Certify that funds can be requested within 90 days of Funded Approval for design and full grant, 180 days for site acquisition
 - http://www.dgs.ca.gov/opsc/Home/PriorityFunding.aspx
- Wait for bond sale
 - Generally in Spring and Fall

Access Advance Funding (cont.)

- Receive SAB Funded Approval
- Execute Charter School Agreements (CSFA)
 - Memorandum of Understanding
 - Funding Agreement (if taking loan)
 - Use Agreement if title not held by charter
- Current financial soundness (CSFA)
- Additional requirements for site acquisition and when charter holds title
- Submit Fund Release Request Form (Form SAB 50-05)

Converting Your PA

Prepare for Submittal of Conversion Application

- Must submit complete and valid conversion application 4 years from date PA warded unless onetime, one-year extension is requested
- Final DSA and CDE plan approval
- Final CDE site approval for new construction, or if site not previously approved by CDE
- Close escrow if purchasing site
- Submit complete and valid Application for Funding (From SAB 50-04)

Converting Your PA

Conversion Application

- OPSC determines actual total cost
- Financial Soundness Determination
- SAB Unfunded Approval
- Placed on Unfunded List (Lack of AB 55 Loans)
- Priority Funding Process
 - At this phase charter will receive occurrences
 - Not participating in certification
 - Not making deadline to submit Form SAB 50-05
 - Two occurrences will result in project rescission

Projects In Process

Funding can reimburse completed projects

- All CSFP/SFP requirements must be met
- Cannot occupy new construction projects prior to OPSC receipt of a complete Form SAB 50-04
- PWM compliance for projects with construction contracts awarded on or after January 1, 2012 to June 24, 2014
- DIR notified within 5 days of initial contact award for projects with construction contracts awarded after January 1, 2012

OPSC Website

- CSFP
 - http://www.dgs.ca.gov/opsc/Programs/charterschoolfacilities program.aspx
- Current Form SAB 50-09
 - http://www.dgs.ca.gov/opsc/Forms/formsbynumber.aspx
- PTN Generator
 - https://www.dgsapps2.dgs.ca.gov/OPSC/PT/Login.aspx
- Priority Funding information
 - http://www.dgs.ca.gov/opsc/Home/PriorityFunding.aspx
- SFP Handbook
 - http://www.dgs.ca.gov/opsc/Resources/Guides.aspx

CSFP Contacts

Karen Mandell, Supervisor

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Erin Cunneen, Project Manager

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